APPENDIX A: GLOSSARY

This page is intentionally left blank.

Glossary

1. **Academic Calendar** - Type of academic term used by the institution for the student. Acceptable terms are:

   1 = Credit Hours (nonstandard terms)
   2 = Credit Hours – Standard Terms of Quarters
   3 = Credit Hours – Standard Terms of Semesters
   4 = Credit Hours – Standard Terms of Trimesters
   5 = Clock Hours
   6 = Credit Hours Without Terms

2. **Account Classification Codes (ACCS)** – The Account Classification Codes make up the Department of Education's full account number. The ACCS are comprised of multiple segments, such as the fund code, funding fiscal year, organization code, project code, object class, function code, DUNS number, and general ledger account. The Department of Education's ACCS has been designed to take advantage of ORACLE's flexible tools for recording, reporting, and controlling accounting information. The ACCS accommodates and classifies information from Department of Education Financial systems.

3. **Adjustment Sign** - Indicates whether the net accepted change on the processed payment record is an increase (+) or decrease (-). Zero change is also represented by a + sign.

4. **Administrative Cost Allowance** - Money paid to institutions to offset some of the cost of delivering financial aid to students. For the Federal Pell Grant program, the amount is $5.00 for each student at the institution who receives a Federal Pell Grant. This amount is based on the number of Pell recipients reported by the institution, including students who withdrew from institution or were transferred (even if all Federal Pell Grants were recovered).

5. **Administrative Relief Request** – A school's request to the Department of Education or the contractor to grant relief which prevents the school from meeting the September 30 deadline, such as:

   A)   An event, like natural disaster
   B)   Processing Error

6. **ADE** - Automated Data Exchange.

7. **ADP** - Automated Data Processing.

Glossary

8. **Advance Funding Method** – Under the Advance Payment Method, an institution receives an initial authorization amount from which it may draw down funds from the Grants Administration Payment System (GAPS). RFMS will continue to adjust the initial authorization amount during the award year based on the disbursement records transmitted by the institution. While the Advance payment method is the one most currently used by most institutions, an institution may need to adjust its business process since the institution's authorization level is adjusted based on the receipt, and acceptance, of disbursement records by RFMS.

9. **Amount Disallowed Due to Errors/Corrections** - Amount disallowed by the Federal Pell Grant program edits in determining a student's award.

10. **Amount of Net Accepted Change** - Net change to the student's award as a result of processing the student record (refer also to Adjustment Sign).

11. **Amount Paid to Date** – The portion (amount) of the Federal Pell Grant the institution has actually paid the student (either by check or credit to the account), as of the data the payment record is reported to the Federal Pell Grant program.

    The Amount Paid to Date plus the Remaining Amount to be Paid cannot exceed the student's total Federal Pell Grant for the entire award year, taking into account the student's expected enrollment status.

12. **Attended Campus** - Campus attended by the student as denoted by the Pell ID. If the school is a branch campus with a unique Pell ID, the branch campus Pell ID is used. If the school is a branch campus without a unique Pell ID, the Pell ID of the central campus is used.

13. **Audit Adjustment Report (AAR)** – A report that the school submits showing the student's award amount greater or lesser than the amount shown on the SPS or the students' payment dates appear appears on the institution's records but does not appear in the SPS.

14. **Award** - Amount of the Federal Pell Grant for which a student is eligible during an award year.

15. **Backup** - (For the PC-based software) Copying the database files to a diskette or other media type provides a back-up of student payment record information in case of a system failure.

Glossary

16. **Batch Number** – Institutions/Servicers assign their own batch numbers when they submit origination and disbursement batches to ED. They must assign batch numbers in the format ED prescribes in the RFMS Grant Batch Header Record fields 15-40. Format is:

    XX = Batch Type Code (alpha)
    CCYY = Last Year in Cycle
    999999 = Reporting Pell Institution Number
    CCYYMMDD = Date Batch Created
    HHMMSS = Time Batch Created

17. **Batch Processing Date** - Date on which the Federal Pell Grant program completes processing the origination or disbursement data batch.

18. **Batch Recreate** - A function of the origination and disbursement software which allows a user to recreate an origination or disbursement payment data batch using a batch sequence number.

19. **Batch Replacement** - A function of the origination and disbursement software which allows the TIV WAN to replace a batch previously generated. The function matches batch sequence number.

20. **Batch Sequence Number** - Unique, four-digit, system generated batch number that is linked to each student origination and disbursement record batch generated by an institution. Used for tracking and audit trail purposes. (Formerly "internal batch number").

21. . **Central Processing System** - This system processes student financial aid applications, calculates the Expected Family Contribution (EFC) for each applicant, and prints the Student Aid Report (SAR).

22. **Central Reporting Campus** – This is the campus where the student is actually in attendance.

23. **Certification** - The initial step an institution takes to become a participant in the Pell Grant Automated Data Exchange. The institution must complete the Federal Pell Grant program Data Exchange Certification form and submit the form to the Department of Education.

24. **Clock Hour Programs (or Clock Hour Programs Without Terms)** - Identifies academic programs in which duration is measured by clock hours or by credit hours completed with no terms.

Glossary

25. **Contracting Officer's Technical Representative (COTR)** – U.S. Department of Education's representative who is responsible for the technical aspects of the project, technical liaison with the Contractor, and any other responsibilities that are specified in the contract, such as inspects all deliverables, including reports, and recommends acceptance or rejection to the Contracting Officer.

26. **Cost of Attendance** - Used to determine the student's Scheduled Pell Grant award and is always based on the cost for a full-time student for an entire academic year. It must be greater than 0000. These costs consist of:

    * Tuition and fee
    * Allowances for room and board
    * Allowance for books, supplies, transportation, and miscellaneous personal expenses
    * Allowances established by the institution for dependent care, disability-related expenses, study abroad, and employment expenses related to cooperative education programs.

    Special exceptions to which cost components apply include: less than half-time students, correspondence study students, incarcerated students, and students receiving instruction by telecommunications.

27. **Current Social Security Number** - Social Security Number, as reported by the student in the Federal Student Aid Application Processing System for the Transaction Number given.

28. **Database** – Information entered in the computer and stored in various files.

29. **Database Management Services** – The production services for preparing and transmitting data to and from the RFMS within a designated time period. The service also includes mailing the output products to institutions and servicers.

30. **Data Request** - Electronic Transmission request to the Federal Pell Grant program for replacement of missing disbursement batches.

31. **Date Enrolled This Award Year** - Date the student first enrolled (i.e., first day the student attended classes) in an eligible program for the applicable award year. If the student enrolled in a crossover payment period before the first day of the award year (July 1), report the actual date enrolled, even though that date occurs before the start of the award year

Glossary

32. **Dear Colleague Letter** – A means of communicating policy or major programmatic information on Federal student financial aid issues from ED to the postsecondary financial aid community.

33. **Decrease Award Report (DAR)** – A report that the school submits student's total payment amount less than the amount shown on the SPS showing or if the student received an overpayment.

34. **Destination Point** – In EDE, the receiver and transmitter of Title IV applicant and/or Pell Grant payment data with the TIVWAN network. May be a postsecondary institution servicing one or more institutions or a service agent servicing multiple institutions.

35. **Disbursement Record (Regular)** – A simple Electronic Data Interchange (EDI) compliant record that contains regular disbursement information. This record is used by advance funded or Just-In-Time pilot institutions.

36. **Disbursement Record (Special)** – A record that indicates regular disbursement and additional payment-period-specific data. This record is used by institutions that have been placed on either the reimbursement or cash monitoring payment methods by ED or institutions that cease to participate in the Federal Pell Grant program sometime during the award year.

37. **Document** – Any form within RFMS; generally used for forms containing financial aid data (e.g., applications, Student Aid Reports, Payment Vouchers, Processed Payment Vouchers, etc.).

38. **Downside Adjustment** - Amount of money that an institution returns for their Federal Pell Grant program recipients during the award year. This return should occur no later than 30 days from when the student's award changed.

39. **DUNS Number** – Data Universal Numbering Scheme.

40. **EAPS** – Electronic Applications. A function on the main menu of the **Pell Payment PC Software** that enables users of the Electronic Data Exchange to input ISIRs without using EDExpress for Windows.

41. **ECAR** - Electronic Correction to Applicant Record. A record containing corrections to applicant data transmitted electronically over the network. This corresponds to the Electronic Corrections stage of Electronic Data Exchange program.

Glossary

42.   **EDE** - Electronic Data Exchange. Allows participating destination points to exchange Federal student aid application and Federal Pell Grant payment data electronically with the Title IV WAN.

43.   **Edit/Comment Codes** – a series of numeric codes that explains processing results, including data corrections and record rejects, for specific processed origination and disbursement records for a Federal Pell grant recipient.

44.   **EFC** - (see Expected Family Contribution).

45.   **Electronic Disbursement Service** - Describes the function of Electronic Data Exchange that provides for two-way electronic transmission of Pell Origination and Disbursement Data records between the Federal Pell Grant program, via the TIV WAN, and the destination points; and the return of Origination and Disbursement Acknowledgment records from the Federal Pell Grant program to the destination point, through TIV WAN.

46.   **Electronic Disbursement Information** – The former name of a software module not called the Pell Payment PC Software, which is invoked by EDExpress and used to preload Pell eligible applicant records, enter and maintain payment records, generate payment batches, produce reports on recipients, and post processed payment records to the Federal Pell Grant database.

47.   **Eligibility Used** - Displays the percent of a student's eligibility that has been used from other campuses.

48.   **Eligible Applicant(s)** - A student who has submitted a Free Application for Federal Student Aid (FAFSA) application and who meets the eligibility requirements for a Federal Pell Grant. The student must be currently enrolled or a prospective student at a postsecondary institution which has been accredited to participate in Student Financial Aid programs.

49.   **Enrollment Status** – (See Field 216 of the Origination Record).Used only for standard academic term schools. Includes student's expected enrollment status for the entire award year. If student's enrollment status is mixed, then the enrollment status "5- Other" is used. Input values are:
     1 - full-time
     2 - ¾-time
     3 - ½-time
     4 - less than ½ time
     5 - other

Glossary

If Academic Calendar = 2,3, or 4	Enrollment Status = 1,2,3,4, or 5
If Academic Calendar = 1 or 4	Enrollment Status = blank

50. **Entity Number** - A unique 12Xcharacter identification code assigned to an institution by the Department of Education. The entity number consists of the taxpayer identification number preceded by a single-digit number and followed by a letter and a number.

51. **Electronic Pell Origination and Disbursement Data** - The electronic equivalent of the Student Origination or Disbursement Record enabling institutions to report Federal Pell Grant Origination and Disbursement data to the Department of Education. Corresponds to the Electronic Disbursement Service function of the Electronic Data Exchange program.

52. **Electronic Pell Origination and Disbursement Acknowledgment Data** - The electronic origination or disbursement acknowledgment record returned to the institution containing updated student origination or disbursement information. Corresponds to the Electronic Disbursement Service function of the Electronic Data Exchange program.

53. **Electronic Statement of Account (ESOA)** - Electronic version of the Statement of Account (SOA) which summarizes the status of an institution's spending authorization versus amount expended to date for that award year.

54. **Electronic Year-To-Date** – The electronic version of the Year-to-Date record data.

55. **Estimated Disbursement Dates** – This is field position 68-75 in the Student Origination Record. Contains 15 dates of when disbursement to student is estimated to be made. Valid Values = CCYYMMDD.
Range: N days prior to Disbursement Start Date (19990701) to Disbursement End Date (20050930).

56. **Expected Family Contribution (EFC)** - EFC is used for all Title IV programs. The number is calculated by the Federal Student Aid Application Processing System. To be eligible for a Federal Pell Grant, the EFC must be 2925 or less (for 1999-2000).

57. **Federal Pell Grant Payment Schedule** - Schedule of Federal Pell Grant Awards. Schedule is based on EFC, enrollment status, and the institution cost of attendance.

58. **Federal Pell Grant Program** - The computerized financial management processing system supporting the operating mission of the Federal Pell Grant program.

Glossary

59. **Financial Control** - A code indicating the source of financial control for your institution. Use the code that best describes your institution:
    1 - Public
    2 - Private, nonprofit
    3 - Proprietary
    Blank - no change

60. **Floppy Disk Data Exchange** – Was operational until 1998-99 and was a method of submitting Pell Grant payment data to, and receiving processed payment data from, the Federal Pell Grant program using the Pell Payment PC software. Payment and processed payment data was exchanged between the Department of Education and the institution by mailing personal computer disks.

61. **Free Application for Federal Student Aid (FAFSA)** - The application that must be filed to apply for any student financial aid distributed by the federal government.

62. **Full-Time Enrollment** – The total number of full-time undergraduate students enrolled in the institution. Does not include full-time equivalents.

63. **Generate** - Refers to creating a batch of student origination and disbursement records to submit to the Federal Pell Grant program.

64. **Grants Administration and Payment System (GAPS) –** System used by EDGAPS for grants administration and payment.

65. **Grant Batch Header Record** – This record is part of the Origination Record and reports the institution's identifying code numbers, output media, and processing dates.

66. **Grant Batch Trailer Record** – This record is part of the Origination Record and reports the number of student records included in the transmission, amount paid to date on the transmission, and total disbursements to date for all Federal Pell Grant recipients at the institution.

67. **Hours/Credits in Program Academic Year** - The number of program hours in a program's year. Completed only by programs using clock hour or non-standard term credit hour academic calendars. If the student attends a term-based program measured in credit hours (including standard academic term programs with less than 30 weeks of instructional time), enter the number of weeks of instructional time in the school's definition of academic year.

Glossary

68. **Hours/Credits Paid From Year** - The number of program hours a student is expected to complete in a school year. Completed only by programs using clock hour or non-standard term credit hour academic calendars. If the student attends a standard academic term program with less than 30 weeks of instructional time, enter the number of weeks of instructional time in the fall through spring terms.

69. **Incarcerated Federal Pell Grant Program Recipient** - This field corresponds to position 198 of the origination and origination acknowledgment data record. Indicate "Y" in this field if the student meets the following criteria:

    - Is incarcerated at present.
    - Is not serving under a sentence of death or under a life sentence without the possibility of parole.
    - The facility in which the student is incarcerated is located in a state that uses the Federal Pell Grants to supplement, and not supplant, the level of postsecondary assistance provided by the state to incarcerated students, as certified by the Department of Education. This does not apply to federally incarcerated students.

    Indicate "N" if the student was previously reported as incarcerated but is not (or no longer) incarcerated. Otherwise, leave the field blank.

70. **Institution Cross Reference ID** - Optional field that can be entered into the student payment record as an optional identification field (e.g., may be a school-assigned student ID or different SSN).

71. **Institutional Student Information Record (ISIR)** - Electronic version of the Student Aid Report (SAR) which indicates eligibility for Federal Pell Grant programs. The ISIR contains the family's financial and other information as reported by the student on the financial aid application. The student's eligibility for aid is indicated by the EFC on the ISIR.

72. **Internal Batch Number** - see "Batch Sequence Number."

73. **IPR Batch Report** – Formerly known as IPS Batch Reports prior to 1996-97. A summary report produced by the Federal Pell Grant program for each batch of payment data submitted by an institution to the Department of Education. The report contains basic information such as number of students submitted, total payment amount, number of students and payment amounts rejected in error, and error reconciliation information.

Glossary

74. **ISIR** – Institutional Student Information Record. The ISIR contains the information reported on the Free Application for Federal Student Aid (FAFSA), as well as key processing results and NSLDS Financial Aid History information. It is transmitted electronically or provided on tape to postsecondary institutions and state educational agencies.

75. **Just-In-Time (JIT) Method** – The Just-In-Time payment method is a new payment method available for the first time in the 1999-2000 award year under a pilot project. Under this payment method, an institution does not receive an initial authorization, and the accepted disbursement records not only report disbursement amounts but also function as the institution's request for funds that are provided immediately to the institution. As a result of this systemic improvement, institutions using the Just-In-Time payment method are relieved of several cash management regulatory requirements.

76. **Key Help** – Displays the help keys available for the add, edit, and delete functions.

77. **Last Updated** – Displays the user ID, date, and time the information currently displayed on the screen was previously edited.

78. **Mail Receipt** – The processing function for receiving, slitting, pre-batching, and shelving mail.

79. **Management Information System (MIS) –** A series of reports which inform ED staff as well as project managers and staff of the status of all aspects of RFMS

80. **Months When Remaining Payments Will Be Made** – Months in which subsequent payments are made to the student. The Federal Pell Grant Program automatically funds the account, based on the payment information provided when the student payment records are submitted. The number of months indicated must equal the number entered in the Number of Remaining Payment Months field. Valid input values are "8" or "9" for the 1998-99 award year.

81. **More than Full Academic Year Code** – Blank or "M" (for more than a full academic year) and the total payment amount (sum of Amount Paid to Date and Remaining Amount to Be Paid) is greater than one full Federal Pell Grant award.

82. **Multiple Record Flag** (for PC-based software) – Appears on the processed payment screen. A value of "M" means that more than one record (segment) is present for this student at this Reporting Campus.

Glossary

83. **Name Code** - First two characters of the student's last name as reported on the original application and part of the Student ID. Provided in the ISIR and appears on the SAR, Part 1 and Part 2.

84. **Number of Count (N-Count)** - Number tabulated.

85. **Number of Payment Periods in Student's School Year** – Number of terms or payment periods in student's school year. For schools required to submit special disbursements, reporting must have valid values. Valid Values: 1-9 or blank.

86. **Origination Record** – This record establishes a student's eligibility and amount of annual Pell Grant Award in the new RFMS. Origination Records are prepared and submitted by institutions to RFMS using the EDExpress software or the institution's own software. Origination Record data is received and edited by RFMS to ensure that the student is eligible to receive the reported amount of Federal Pell Grant funds and to establish the student account in the RFMS.

87. **Original Social Security Number** - The SSN as *originally* reported by the student to the Federal Student Aid Application System. The student's Current Social Security Number is not the same as the Original Social Security Number (used in the Student ID to submit origination or disbursement data) if the student has submitted SSN changes to the Federal Student Aid Application Processing System. **ALWAYS** use the Original SSN when entering student data.

88. **Original Student Payment Record** – Before a payment record is submitted for processing it is termed an original payment record. An unselected original payment data record will have a processing stage of "N".

89. **Part-time Enrollment** – The total number of undergraduates who attend at least half-time.

90. **Payment Change Date** – Date the institution made a new award or changed a previously reported award.

Glossary

91. **Payment Methodology** - Method of calculation used to determine a student's payment in the Federal Pell Grant program. The six methods are for:

   (1)   Standard-term, credit-hour program where weeks in program's academic year is greater than 29.
   (2)   Standard-term, credit-hour program in which the weeks in program's academic year is less than 30.
   (3)   Any term-based, credit-hour program.
   (4)   Clock-hour programs and credit-hour programs without terms.
   (5)   Programs offered by correspondence.
   (6)   Not assigned; do not use.

92. **Payment Schedule** - For PC-based software, displays a table which helps you calculate the student's award. The payment tables are now viewed using the Windows software help text.

93. **Payment Voucher** – For PC-based software, displays a table which helps you calculate the student's award. The payment tables are now viewed using the Windows software help text.

94. **Pell Award Cycle** - The academic year for the Federal Pell Grant program, beginning July 1 and ending September 30 of the following year. For example, for 1999-2000, the award year is from July 1, 1999 to September 30, 2000. However, the deadline for reporting student payment data is September 30 following the end of the award year. Funding for the Federal Pell Grant program is provided on the basis of the award yearXthus a student is paid out of funds designated for a particular award year, such as the 1998-99 award year or the 1999-2000 award year.

95. **Pell Grant** – A type of federal financial aid awarded to qualified student applicants. Named afterU.S. Senator Claiborne Pell of Rhode Island.

96. **Pell Institution Number** – A six-digit representation of a postsecondary educational institution eligible to participate in the Federal Pell Grant Program.

97. **Pell Grant Automated Data Exchanges** - The automated methods of submitting payment data to, and receiving processed payment data from, the Federal Pell Grant program. Automated Exchange Methods include: EDE for electronic exchange, RDE for computer tape or cartridge exchange (will be discontinued following the 1999-2000 award year).

Glossary

98.   **Pell ID of Attended Campus** - (For PC-based software) Pell Institution Number of the campus where the student is actually attending. If your institution is a central campus and your branch campuses have unique Pell Institution Numbers, always enter the Pell Institution Number of the campus the student is actually attending. This item must be defined in the **Institution** database before any student records can be added. Select **Institution** from the Setup pull-down menu to add the Attended Campus to the **Institution** database.

99.   **Pitney Bowes Computer Output Mailing Machine** – Device used to accomplish machine folding, collating, inserting, postage application, and zip code marking of output documents in one continuous operation.

100. **Postage Meter** – Machine that applies postage to envelopes and packages.

101. **Potential Overaward Project** - Also known as POP. Federal Pell Grant regulations allow a student to receive a maximum of one full Scheduled Pell Grant (SPG) during an award year. The Federal Pell Grant Recipient Financial Management System (RFMS) is programmed to calculate the percentage of SPG used each time an institution reports a recipient's award. Any amount exceeding 100 percent of a full SPG represents an over award and is disallowed.

102. **Print** -For PC-based software, allows you to make a hard copy of the requested report or information.

103. **Process Date for Application Transaction** - Date that the particular applicant transaction (with a specific Transaction Number) was processed through the Federal Student Aid Application Processing System. It appears in century/year/month/day (CCYYMMDD) format.

104. **Processed Disbursement Acknowledgment Record** - (For PC-based software) Student origination and disbursement data records submitted and processed through the Federal Pell Grant program. Origination and Disbursement Acknowledgment data batches are returned to the institution and loaded into the software's database. Unselected Origination and Disbursement Acknowledgment data records have a processing stage of "P."

105. **Processing Date** - Date that the Origination or Disbursement record was processed through the Federal Pell Grant program. This appears on the Acknowledgment record in century/year/month/day/ (CCYYMMDD) format.

Glossary

106. **Processing Stage** - Defines the specific processing status of a student record in the Pell Grant database maintained by the PC-based software.

    Valid processing stages are:
    A - Applicant Data record (No payment data)
    B - Batched for submission or resubmission (New Student Origination and Disbursement records or Acknowledgment Data record)
    C - Changed AFTER batched for submission to the Federal Pell Grant program (Student Origination and Disbursement or Acknowledgment Data record).
    N - New Student Origination or Disbursement record (no Acknowledgment data from the Federal Pell Grant program).
    P - Origination or Disbursement Acknowledgment Data record (returned from the Federal Pell Grant program).
    Q - Quit during entry or update of record (incomplete record).
    S - Selected for submission or resubmission (Student Origination or Disbursement or Acknowledgment record).
    U Updated Origination or Disbursement Acknowledgment record (AFTER posted to the database when returned from the Federal Pell Grant program).

107. **Processing Year -** The Federal Pell Grant program processing cycle which begins July 1 and ends on September 30 of the following year.

108. **Project Code** – The Project Code is a segment of the Account Classification Codes that make up the Department of Education's Full Account Number. The project code segment has 8 characters.

109. **Quit and Save** – Allows you to save an incomplete record with the processing stage of Q.

110. **Recipient Data Exchange (RDE)** - The method by which institutions submit student payment data to, and receive processed payment data from, the Federal Pell Grant program using magnetic tape reel or cartridge. 1999-2000 is the last award year this medium will be used in RFMS.

111. **Record Status Code** - A code which indicates the processing results for RFMS Origination and Disbursement records. The records' three status code values are:

    A = Accepted
    C = Corrected
    E = Rejected

Glossary

112. **Reindex** - A function of the payment software in which the file indices are physically reordered, resulting in faster searches.

113. **Remaining Amount to be Paid** – The portion (amount) of the Pell Grant the institution still expects to pay the student for the remainder of the award year, as of the date the payment record is reported to the Federal Pell Grant program. The Remaining Amount to be Paid + the Amount Paid to Date cannot exceed the student's total Pell Grant Expected Disbursement for the entire award year, taking into account the student's expected enrollment status.

114. **Reported Date Enrolled** - First date the student was enrolled, as reported by the institution (see Date Enrolled This Award Year).

115. **Reporting Campus** - The Pell Institution Number of the campus that receives the Federal Pell Grant Authorization for the institutions. For a school system that has a central campus and branch campuses that have unique Pell Institution Number, the Reporting Campus is the central campus. This item is entered under the Institution option from the **Setup** menu.

116. **Reset Batch** - A function of the payment software which allows the user to reset rejected records from processing stage "B," for submitted for payment to processing, to processing to "S," for selected for payment.

117. **Restoring Backup** - (For PC-based software) In the event of a hard disk crash or other catastrophe, the user can select this function to restore the database from the diskette of other media type to the state of the last backup date.

118. **RFMS Origination and Disbursement Record Acknowledgments** – An RFMS Origination or Disbursement Acknowledgment PPD which has been processed through the Federal Pell Grant program. Acknowledgments are returned to the institution with updated information reflecting the results of the Federal Pell Grant program processing.

119. **SAR** - Refer to Student Aid Report.

120. **SPS** **-** Refer to Student Payment Summary

121. **Save** - For PC-based software, allows you to save a complete record.

Glossary

122. **Secondary EFC Used** - A code indicating the Expected Family Contribution (EFC) on which the institution based the student's Federal Pell Grant award. The acceptable values are:

Blank - Secondary EFC never used.
S - Federal Pell Grant award based on the Secondary EFC, is calculated by the CPS or Blank if Secondary EFC is not used.
O - Federal Pell Grant award previously based on the Secondary EFC and reported to the Federal Pell Grant program; student's award now based on the original EFC.

123. **Secondary Expected Family Contribution** - If the student provided his application information for both the simplified needs analysis test as well as for the full needs analysis test, then the student could have two Expected Family Contribution numbers. The number from the full data element formula is the Secondary EFC. The user can elect to calculate the Pell award on the Secondary EFC. However, to pay on the student's Secondary EFC, indicate an "S" in the Secondary EFC Used field. If you previously reported making payments on a Secondary EFC and you want to go back to payment on the primary EFC, indicate an "O." In all other cases, leave this field blank.

124. **Segment Number** – Internal number assigned by the Federal Pell Grant program to uniquely identify a payment record (segment) submission for the student. The Check digit calculation also uses the Segment Number. For adding an Original Student Payment Record, the segment number is "00" for students not reported to the Federal Pell Grant program in the current award year.

125. **Segment Status** – The status of the student's payment data relative to your Pell Grant account. Current (active) payment records appear with an "A" and inactive records contain an "I". The Federal Pell Grant program honors payment on only one record per student for each attended campus.

126. **Selected for Payment** - One of the four processing stages used in the Pell PC Payment software. Records fall into this category are submitted in the next student payment data batch.

127. **Service Agent** - An individual, partnership, or corporation that acts for an institution in the administration for reporting to the Federal Pell Grant program.

128. **Special Condition form Indicator** – Designates the type of application submitted to the Federal Student Aid Application Processing system. If a "Y" is displayed in this field, a

Special Condition Form was filed. This field can be viewed by pressing <**F4**> when editing a Processed Payment Record.

129. **Stage "B" Batched for Processing** – The origination and disbursement software processing stage that indicates the record has been batched for Federal Pell Grant processing.

130. **Statement of Account (SOA)** - A report to an institution participating in the Federal Pell Grant program which summarizes the status of the institution's spending authorization versus amount expended to date for that award year. PGRFMS produced this report. The new RFMS will produce only an electronic version.

131. **Student Aid Organization Team (SAOT)** – The organization that is responsible for the processing of student applications for Pell Grant funds.

132. **Student Aid Report (SAR)** - The federal "output document" printed by a FAFSA processor and mailed to the student. The SAR contains the family's financial and other information as reported by the student on the financial aid application. The student's eligibility for aid is indicated by the EFC printed on the front of the SAR.

133. **Student Aid Report (SAR) Record ID** – This ID consists of the student's Original Social Security Number, the first two letters of the student's last name (name code), and the Transaction Number.

134. **Student Financial Assistance Program** – An organization within the U.S. Department of Education that administers the student financial aid programs and for developing the policies and procedures to meet the objectives of those programs. It provides funds to meet students' educational costs at the postsecondary level. This program is referred to as a 'Title IV program'.

135. **Student Payment Summary (SPS)** – A report produced by the Federal Pell Grant program which provides the Federal Pell Grant award amount for each student for whom payment data was submitted during the award year.

136. **Students Attending Multiple Branch Campuses** – RFMS accepts one origination record per reporting campus/attended campus combination. If your institutional system has branch campuses with unique Pell Institution Numbers, and students attend more than one campus during the award year, origination records must be established in RFMS for each attended campus a student attends. When making disbursements to students who attend more than one campus during the award year, you must assure that the total disbursements to a student do not exceed his/her scheduled Pell award for the award year.

Glossary

137. **Term and Nonterm Programs not using Formula 1** - Identifies academic programs which use any of payment methodologies 2-6, but not formula 1.

138. **Time Period** – Payments at Another Frequency. This field indicates the period type for Payments made at Another Frequency. Valid Values: WK, MO, TM, YR, MT, QT, TR, and SM.

139. **Title IV Wide Area Network (TIVWAN)** – A telecommunications service provided by ED which allows Title IV applicants and Pell Grant payment data to be transmitted electronically.

140. **Total Payment Ceiling** - Displays the maximum available award for a student.

141. **Transaction Number** - Two-digit number assigned by the Federal Student Aid Application Processing System. This number is the third part of the Student ID assigned by the Federal Title IV Program Application Central Processing System. The SAR ID is included in the ISIR data record and in both Part 1 and Part 2 of the SAR.

142. **Transfer Data** - For PC-based software. Information may be requested on Pell Grant disbursements by other institutions to students for whom origination acknowledgment records have been received from RFMS. In response, RFMS sends Multiple Reporting Records (MRRs) that can be used to import the data into your recipient data base. The Department's EDExpress Pell software also permits the entering of transfer disbursement information manually.

143. **Transmittal** – A form submitted to the Pell Grant program by the institution to accompany a magnetic tape providing information that identifies the tape, it's contents, and the sender.

144. **Transaction Number** – A two-digit number assigned sequentially by the Federal Student Aid Application Processing System to uniquely identify a specific transaction for the applicant and for processing control purposes.

145. **Type of Institution** - A code describing the length of the majority of programs at the institution. Institution type changes are reported to RFMS in the Institution Data Record (Position 232). Corresponds to Item 4 on the Institutional Payment Record (IPR).

146. **Type of Payment Frequency** – This is the number of payments that your institution normally makes to your Federal Pell Grant recipients during the award year. Corresponds

Glossary

to item 10 on the Institutional Payment Record (IPR). To make a change, use the code that best describes your payments.

1 – Two per year
2 – One per term
3 – Two per term
4 – Two terms plus plus mini-term
5 – Monthly
6 – Other (must be reported in Payments at Another Frequency)

147. **Universe File** – A computer file of institutions participating in the Pell Grant Program provided by ED. This file is also called the Institution Master File.

148. **Uploading** – The process of transmitting data from a Personal Computer, minicomputer, or floppy diskette to a mainframe.

149. **Verification Status Code** - A code that the user enters which best describes the method used to verify the student's application information. The *Verification Guide* gives a complete description of the verification process. The codes which can be entered are:

N - Not Selected C - Calculated
A - Accurate Data R - Reprocessed
W - Without Documentation S - Selected, Not Verified
T - Tolerance Applied

Note: The verification code cannot be an "R" for students with transaction 01.

150. **Volume Serial Number** – A unique number used to identify a computer tape.

151. **Weeks in Program Academic Year** - The number of weeks on instruction in the program's academic year.

152. **Weeks Used to Calculate Payment** – The total number of weeks of instructional time you use to calculate this student's award.

153. **Year –to-Date (YTD) Data** – total year-to-date originations/disbursements accepted by the Federal Pell Grant program for an institution for an award year. .

Glossary

This page is intentionally left blank.